

**Expert Report of Jonathan D. Hibbard, Ph.D. and Scott D. Swain, Ph.D.**  
**Re: Dice Game Assessment and Analysis**  
**Revised August 23, 2007**

We have been asked to provide our opinion in this report as experts and scholars in marketing. Our conclusions are based upon research in marketing, knowledge of marketing and behavioral science theory, and relevant data sources, which include learned treatises, internet searches, publicly available information, visits to web sites and retailers, and materials provided to us by counsel. See Appendix A.

This report provides our assessment of the extent to which "LCR" and "Left Center Right" as used by George & Company LLC (George & Co) in association with its dice game are interchangeable in consumers' minds as distinct identifiers of the source of the market offering.

In addition, we provide an analysis using the established marketing framework, commonly known as the 4P's Marketing Mix - product, price, place, promotion, to compare the dice game product offering of George & Co with the dice game product offering, which uses the name "Left Center Right," of Imagination Entertainment Limited/Imagination Holdings Pty Ltd" (Imagination Holdings).

#### **Summary**

For the reasons provided below, we conclude that the names "LCR" and "Left Center Right," as they are used by George & Co and appear in the marketplace, are likely to be perceived by consumers/trade partners and potential consumers/potential trade partners as distinct, interchangeable brand names/identifiers of source and associated with the George & Co dice game.

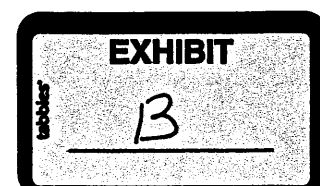
In addition, the "marketing mix" comparative analysis leads us to conclude that the marketing of the Imagination Holding's dice game has significantly overlaps with the marketing of George & Co's dice game.

#### **Introduction**

Dice games are games that use or incorporate dice as their central (versus secondary) component, usually as a random device. Dice games would be considered a product category within the larger market of games.

George & Co's dice game is identified by its game components (e.g., dice and chips) and game rules as well as by the distinct names "LCR" and "Left Center Right" and associated text copy, packaging, colors, and visuals. George & Co's dice game was introduced for sale in 1986. Additionally, George & Co's dice game is distributed to thousands of retailers nationwide and is sold through online retailers. Since 1997, George & Co's dice game has sold approximately 2 million units.

Earlier this year, Imagination's "Left Center Right" dice game became available for sale in the United States. Like George & Co's dice game, Imagination Holding's dice game uses the name "Left Center Right." Additionally, Imagination Holding's dice game uses similar game



components, similar game rules, similar visuals, similar pricing, and similar distribution and retail product display and placement as George & Co's dice game.

#### **A. George & Co's Use of "LCR" and "Left Center Right"**

##### **Brand Names in Consumer Decision Making**

Brand names uniquely identify a firm's market offering to consumers and signal the presence of particular attributes, benefits, and meanings that represent value for the consumer. Brand names can also reduce decision making risk by allowing consumers to identify trusted sources of market offerings. Brand name differentiation is the extent to which a name is unique or "stands out" to consumers in relation to the names of other brands in the product category. When brand names are differentiated in consumers' minds, consumers can identify desired products faster and more accurately. When brand names are undifferentiated, consumers may experience difficulty in distinguishing between firms' offerings.

##### **Consumer Information Processing of Brand Names**

The marketplace is saturated with advertising and marketing communications (both company-generated and consumer-generated) in which brand names appear as acronyms (such as for the furniture chain IKEA) and initialisms (i.e., unpronounceable acronyms formed from the first letter of the words, such as DKNY for clothing designer Donna Karan New York).

In many cases, brand names in the form of an acronym or initialism are introduced by the firm after a period of using the full version of the brand name. Firms often select such shortened names in the belief that these names reduce the cognitive effort required by consumers to process, remember, and recognize the name. That is, firms often choose to provide consumers with a "mental shortcut" for the brand name. In other cases, firms acknowledge shortened brand names due to common usage of such by consumers or employees. For example, MTV's show Total Request Live became known and promoted as TRL after the show's hosts and fans adopted the initialism.

The attributes and context surrounding a brand name acronym or initialism are both important factors for understanding how consumers encode, elaborate, and understand brand name information. Because acronyms such as IKEA are pronounceable, they are encoded in a manner similar to standard words. Many consumers may not be aware that brands such as IKEA (which stands for Ingvar Kamprad, Elmtaryd, Agunnaryd) or SAAB (which stands for Svenska Aeroplan AktieBolaget) are acronyms at all, particularly if the firm does not advertise or market the connection between the acronym and the corresponding name.

In contrast, because brand initialisms are unpronounceable, consumers cognitively access and store them at the letter level (at least initially), yielding a non-word representation. Accordingly, brand name initialisms do not tend to evoke other words or a sense of meaning for consumers, thereby leaving the consumer with a sense of incompleteness regarding the meaning or significance of the brand name, leading consumers to search for more information. Specifically, when consumers sense that there is a gap or incompleteness in their comprehension or knowledge, they are generally motivated to acquire additional information to reduce the attending uncertainty. Accordingly, upon encountering a brand name initialism, consumers are likely to seek to connect

the initialism to the corresponding brand name as a matter of understanding and out of curiosity. When the brand name information is readily available, consumers are able to encode both the initialism and the brand name as interchangeable identifiers of the specific product in question. Consumer recognition and acceptance of multiple names for the same object is commonplace in other domains. To illustrate, a person with the name Tom Jones may be known to friends and colleagues as "TJ."

Consumers' desire and preference for knowing the brand name that corresponds to a brand initialism is further motivated by their expectation that firms do not choose brand names randomly. That is, while a brand initialism may appear as a random sequence of letters, consumers expect that the letters stand for a potentially more meaningful brand name. This expectation follows from communication "norms" that reflect the pragmatics of natural language. These norms describe the assumptions that message receivers (e.g., consumers) typically make about the way message providers (e.g., firms) will communicate with them. An important consequence of the existence and operation of these communication norms is that when the literal interpretation of a communication is not meaningful, consumers tend to look for pragmatic meanings or reasons for the communication. This perspective has been used in marketing to explain why consumers who are exposed to brand names that have little or no apparent literal meaning search for additional information to acquire semantic or pragmatic meaning for the brand.

### **Brand Name Information and Consumer Memory**

Associative network theory is a frequently used model of memory that informs researchers' understanding of how brand information, including a brand name, is encoded in consumer memory. In this theory, concepts are represented as "nodes" (bits of information) and the type and strength of the mental associations between nodes is represented by relational "links". For example, nodes comprising a brand concept could include the brand name, product category, attributes, images, and benefits. Links between nodes are developed through exposure to marketing communications, other consumers, and personal experience. Once formed, links and nodes comprising a consumer's representations in long-term memory can be activated, whereupon the contents are made available in a consumer's working memory.

Activation of nodes in the associative network can result from encounters with external stimuli (e.g. marketing messages) or from activation spreading out from other linked nodes (i.e., the consumer thinking about a category or a product). The fact that activation transfers from active nodes to linked, passive nodes provides a mechanism for explaining how certain aspects of a brand can be called to mind by separate but related (linked) aspects of the brand. The likelihood of a bit of information being called to mind by the activation of another bit of information depends on the strength of the link between the two, with a stronger linkage allowing more activation to occur.

The more a link is traversed or activated over time, the stronger it will become. Thus, the mere repetition of information that a consumer processes can serve to strengthen the linkage between elements such as brand names and other brand or product information. Two other major determinants of link strength are node similarity and elaboration. The similarity or relatedness of concepts represented by nodes and linkages is a function of the category-based meanings shared by two concepts. However, even when the frequency of link use and the relatedness of concepts

are initially low, associative links can still be established and strengthened via cognitive elaboration (i.e., relating new information to information that is already stored in memory). Elaboration is most likely when information is unfamiliar, incomplete, unexpected, or interesting. In such cases, more nodes will be activated and the activation will be sustained and widespread. Thus, there is a greater likelihood of finding and establishing a relationship as linkages are strengthened.

### **Applicability to the Current Situation**

As one set of inputs for our assessment of the linkage between George & Co's initialism "LCR" and the corresponding name "Left Center Right," we searched, called, and visited locations where consumers might purchase or encounter dice game products.

These inputs included a review of websites such as Amazon.com, eBay, MSN Shopping; SHOP.com, Shopping.com, Shopzilla (BizRate), Moxie, Spencer Gifts, and toy and hobby store websites, e.g., WorldWide Department Store; BoardGamesExpress; Uncle's Games, Puzzles, and More; CoolStuffInc.com; BoardGameGeek; Purciful's Magical Toys; 5StarDeal.com; Danny Veghs Billards & Home; The Game Preserve; Gamefest.com; Bunco Game Shop; Biffley's; BoardGamesForAll; Funagain Games; and Kaboodle. Printouts of these websites are attached as Appendix B.

We also visited a number of consumer generated content websites to determine how commonly shown or used the initialism "LCR" and the name "Left Center Right" were in order to further verify our analysis, e.g., YouTube, eBay, Amazon.com, MadhouseWifeCellars.com, Tivo Community Forums Archive, Cruise Critic Message Boards, Families.com, and Learnerblogs.org. Printouts from these websites are attached as Appendix C.

The inputs also included placing phone calls to a number of retailers who would be likely to stock the George & Co's dice game, e.g., Biffley's in Fergus Falls, Minnesota; The Compleat Strategist in Boston, Massachusetts; Boing! JP Toy Shop in Jamaica Plain, Massachusetts; Hobby Bunker in Malden, Massachusetts; Toys Etc. in Needham, Massachusetts; Peacock Feathers in Needham, Massachusetts; Happy Feet in Braintree, Massachusetts; Wellesley Toy Shop in Wellesley, Massachusetts; Little Bits in Wellesley, Massachusetts; Games & Gizmos in Newton, Massachusetts; Henry Bear's Park in Brookline, Massachusetts; Magic Beans in Brookline, Massachusetts; Dons Joke Shop in Quincy, Massachusetts; Kay Bee Toy & Hobby Shop in Norwood, Massachusetts; a number of Learning Express stores which are located in Salem, Massachusetts, Andover, Massachusetts, Newton, Massachusetts, Needham, Massachusetts, Hanover, Massachusetts, and Naperville, Illinois; a number of Target stores located in Salem, Massachusetts, Danvers, Massachusetts, Los Angeles, California, West Hollywood, California, and Anaheim, California; a number of Kmart stores located in Pleasant Hill, California, Riverside, California, Harbor City, California, Billerica, Massachusetts, and New York, New York; TA's Hobbies & More in Cleveland, Tennessee; Mad Hatter's House Of Games in Lubbock, Texas; The Gatekeeper in Topeka, Kansas; Chessngames in Las Vegas, Nevada; Fascinations Toys & Gifts in Seattle, Washington; and a number of Spencer Gifts stores which are located in Waterford, Connecticut, Columbia, South Carolina, San Bernardino, California, Phoenix, Arizona, and Saint Louis, Missouri.

Finally, these inputs included visits to retail store locations who would be likely to stock the George & Co dice game, e.g., Boing! JP Toy Shop in Jamaica Plain, Massachusetts; Village Toy Shop in Canton, Massachusetts; The Compleat Strategist in Boston, Massachusetts; Learning Express in Newton, Massachusetts; Learning Express in Needham, Massachusetts; and Spencer Gifts in Saugus, Massachusetts.

The purpose of our information gathering was to ascertain the overall marketing context in which the dice game products, as seen or experienced by consumers/trade partners and potential consumers/potential trade partners, are situated to ensure the applicability of the marketing and behavioral science concepts discussed above.

Our findings from reviewing web sites, calling retailers, and visiting retail stores, along with the materials provided to us, indicate that George & Co's branding and marketing communications has presented its dice game product offering with both the initialism "LCR" and the corresponding name "Left, Center, Right" as brand names (as opposed to generic references for the type of game). For several reasons, this consistent co-presentation generates a strong mental link between "LCR" and "Left Center Right" as distinct brand names in the consumer's mind. First, "LCR" and "Left Center Right" are consistently presented together as brand names in retail point-of-purchase displays and other marketing communications, thereby producing repetition of the mental linkage for consumers or potential consumers who shop in the product category. Second, the initialism "LCR" is likely to trigger consumers to search for the meaning of these three letters, thereby establishing a strong semantic relatedness between "LCR" and "Left Center Right." This semantic relatedness will further strengthen the associative branding link between "LCR" and "Left Center Right" in consumers' memory. Third, based on the norms of brand name communications, consumers expect brand names to have some meaning, whether literal or pragmatic. This expectation further motivates their search for the meaning of the acronym, thereby leading to cognitive elaboration of "LCR" and "Left Center Right." As with repetition and semantic relatedness, this elaboration serves to strengthen the link between the brand names "LCR" and "Left Center Right." It does so by producing additional repetition of the direct mental link between "LCR" and "Left Center Right" as well as by producing indirect links through concepts or nodes related to both "LCR" and "Left Center Right."

## **Conclusions**

Based on our assessment, we conclude that George & Co's use and co-presentation of "LCR" and "Left Center Right" in the marketplace establishes a mental branding association or connection between "LCR" and "Left Center Right" such that they are considered as distinct, interchangeable or "one and the same" in consumers' minds (and retailers' minds) in identifying the source of the market offering.

## **B. Marketing Mix Comparative Analysis**

A fundamental framework in marketing is the "marketing mix," also known as the 4P's (Kotler and Keller 2006, Marketing Management 12<sup>th</sup> Edition). The 4P's are: product, price, place, and promotion. In order to contextualize and understand the 4P's, one must also understand the concept of a target market. This is explained below.

### Target Market

Because sellers of goods and services cannot satisfy every consumer's needs, they must concentrate their resources and marketing efforts toward a specific group or groups of potential customers: these are called their target markets. Once a target market has been identified, the seller then looks to satisfy the specific needs and facilitate decision-making processes of that target market by using a combination of the marketing mix tools, i.e., the 4P's.

### Product

A product is a good or service offered to satisfy a consumer's or a business's needs. The product has various characteristics, which can include: appearance, functionality, packaging, brand name, service/support, and warranty.

### Price

Price is what is exchanged in order to obtain the product (typically money spent to purchase an item). That is, what does the product cost to buy, lease or rent, and what are the manner and terms of payment. Price can include such payment terms as discounts, financing, and leasing.

### Place

Place (also known as distribution) refers to how products are made available to consumers. This typically includes the location or the place of sale of the product (for example, retail stores, online and Internet marketing, mail order, catalogs, etc.), distribution channel members (e.g., wholesalers and retailers), and target market coverage, which relates to how widely the product is distributed.

### Promotion

Promotion refers to how the chosen target markets are informed or educated about the product. This concept typically includes advertising, selling, promotions, direct marketing, and public relations. Often, the seller will focus the promotional elements on a product's "unique selling proposition" to differentiate the product from competing products. A "unique selling proposition" is a desirable, exclusive, and believable marketing appeal, often used as the theme of a marketing campaign. Typically, these promotional elements will have a marketing execution and appeal. The execution is the manner in which the marketing portrays information. The appeal identifies a reason for the customer to buy a product.

Overall, marketers set a marketing mix of the 4P's (product, price, place, and promotion) for each specific set of customers they want to attract to purchase their product or service. A separate marketing mix is usually crafted for each product offering and/or for each target market. The guiding logic in creating and managing the marketing mix is to make decisions that focus the 4P's on the customers in the target market (i.e., the particular consumers the firm would like to proposition) so as to create perceived value. This setting or focusing of the marketing mix variables is called "positioning." The collective result of the marketing mix execution from the consumer's perspective is the brand's identity (who the brand is) and the brand's image (what the brand means to me).

For our comparative analysis, we examined the George & Co dice game and the Imagination Holdings dice game in terms of the 4P's elements and sub-elements. In addition to examining the

dice games themselves, we again reviewed the websites and other inputs discussed in Section A of this report. In addition, we reviewed a second set of inputs, which included websites offering (or expected to offer) the Imagination Holdings dice game, e.g., Toys "R" Us, BoardGamesForAll, Toys (toysatr), Become, Growing Lifestyle, Imagination Holdings (leftcenterrightgame.com), Target.com, Wal-Mart Stores, BestBuy.com, Circuit City Stores, Radio Shack. See Appendix D. We also called retailers expected to offer the Imagination Holdings dice game, e.g., Toys "R" Us, Target, Wal-mart, Best Buy, Circuit City, Radio Shack, and Barnes & Noble.

We also visited retailers offering the Imagination Holdings dice game, e.g., Toys "R" Us in Dedham, Massachusetts and Toys "R" Us in Woburn, Massachusetts.

The marketing mix elements (with examples of sub-elements in parentheses), in addition to the target marketing and the positioning, are listed below:

- Product (e.g., physical appearance, components included, functionality and benefits derived, brand names, and packaging, including visuals and text)
- Pricing (e.g., pricing in retail stores and online websites)
- Place (e.g., distribution channel members, sales channels)
- Promotion (e.g., types of promotion vehicles, marketing focus and themes, benefits promoted, visuals and text)

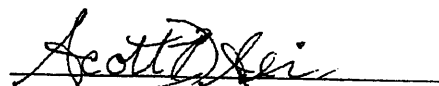
The marketing mix elements and sub-elements for George & Co's and Imagination Holdings' dice games are shown in the attached table. See Appendix E. As can be seen from the table, there are a number of elements and sub-elements that appear to have significant commonalities, e.g., the product themselves, including appearance, components included, functionality, benefits derived, brand names, and packaging visuals, colors and text; place (distribution), including distribution channel used; promotion, including unique selling proposition, promotion vehicles, benefits promoted, visuals and text; and finally, positioning, where we observe many of the same words, phrases, and visuals used by each firm.

### Conclusions

Based on our marketing mix comparative analysis, we conclude that there is significant overlap in the target market and marketing mix elements and sub-elements between George & Co's dice game and Imagination Holding's dice game. This is notable because in formulating a marketing mix, firms make many choices from amongst a multitude of options for their marketing mix elements and sub-elements, making the shared overlap and similarities between George & Co's dice game and Imagination's dice game all the more pertinent.



Jonathan D. Hibbard, Ph.D



Scott D. Swain, Ph.D

## **APPENDIX A**

### **Materials and Data Considered/Exhibits**

Documents provided to us by George & Co.'s counsel.

Academic marketing research and treatises.

George & Co's dice game.

Imagination Holdings dice game.

Publicly available general and marketing information.

Promotional material for George & Co and Imagination Holdings.

Materials on the dice game market from Internet searches.

Visits and phone calls to toy and hobby stores and other retailers, e.g., Toys "R" Us, Wal-Mart, Target, K-mart, Best Buy, and Learning Express.

### **Other Information**

Vitae attached for Jonathan D. Hibbard, Ph.D. and Scott D. Swain, Ph.D.

Professor Hibbard and Professor Swain have agreed to be paid \$325 each per hour for review, research, analysis and report writing, and \$450 each per hour for deposition or trial testimony, plus reimbursement of costs.

Professor Hibbard has previously provided testimony and acted as an expert witness in one legal case within the past four years (Luppen Holdings Inc. vs. Pitney Bowes, Inc.).

Professor Swain has not previously provided testimony or acted as an expert witness in any legal case within the past four years.



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### **EDUCATION**

<b>Northwestern University</b> J.L. Kellogg Graduate School of Management Ph.D. in Marketing	Evanston, IL
<b>Northwestern University</b> J.L. Kellogg Graduate School of Management Masters of Business Administration (with distinction)	Evanston, IL
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### **PUBLICATIONS**

- Brunel, Frédéric F. and Jonathan D. Hibbard (2006), "Using Innovations in Student Teaming to Leverage Cross-Functional and Marketing Learning: Evidence from a Fully Integrated Undergraduate Core," *Marketing Education Review*, (Winter) 16, 15-23.
- Brunel, Frédéric F. and Jonathan D. Hibbard (2006), "Teams That Work. The Science Behind the Art of Cross-Functional Team Learning", *Builders and Leaders*, (Spring) , 20-23.
- Hibbard, Jonathan D., John E. Hogan, and Gerald Smith (2003), "Assessing the Strategic Value of a Business Relationship: The Role of Uncertainty and Flexibility," *Journal of Business & Industrial Marketing*, 18 (4/5), 376-387.
- Brunel, Frédéric F. and Jonathan D. Hibbard (2002), "CRM and the Test of Time," *Builders & Leaders*, Boston University School of Management (Fall), 25-27.
- Gregan-Paxton, Jennifer, Jonathan D. Hibbard, Frédéric F. Brunel, and Pablo Azar (2002), "'So That's What It Is': Examining the Impact of Analogy on Consumers' Knowledge Development for Really New Products," *Psychology & Marketing*, 19 (June), 533-550.
- Hibbard, Jonathan D., Frédéric F. Brunel, Rajiv P. Dant, and Dawn Iacobucci (2001), "Does Relationship Marketing Age Well?," *Business Strategy Review*, Winter, Volume 12 (4), 29-35.
- Hibbard, Jonathan D., Nirmalya Kumar, and Louis W. Stern (2001), "Examining the Impact of Destructive Acts in Marketing Channel Relationships," *Journal of Marketing Research*, (38 February), 45-61.
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- Weinberg, Bruce D. and Jonathan D. Hibbard (2000), "The Emergence of the Internet Consumer-Entrepreneur," *The Manager*, Boston University School of Management, (Spring), 23-24.
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- Iacobucci, Dawn and Jonathan D. Hibbard (1999), "Toward an Encompassing Theory of Business Marketing Relationships and Interpersonal Commercial Relationships: An Empirical Generalization," *Journal of Interactive Marketing*, Summer, 13-33.

- Hibbard, Jonathan D. and Dawn Iacobucci (1999), "Business Marketing Relationships: An Empirical Generalization with Implications for Future Research," (refereed abstract) *Proceedings of the Ninth Biennial World Marketing Congress: Global Perspectives in Marketing for the 21st Century*, June, Malta.
- Hibbard, Jonathan D. and Pablo Azar (1998), "The Use of Analogical Reasoning to Facilitate a Consumer's Understanding and Evaluation of Really New Products," *Society of Consumer Psychology Winter Conference Proceedings* (refereed), Austin, Texas.
- Hibbard, Jonathan D. (1996), "Supply Chain Management: Broadening the Research Perspective," *Manufacturing Roundtable Research Report Series*, Report #451, Boston University School of Management.
- Hibbard, Jonathan D., Nirmalya Kumar, and Louis W. Stern (1996), "Examining Conflict Responses in Interorganizational Settings," *Proceedings of the International Conference on Advances in Management*, Boston, MA.
- Kumar, Nirmalya Jonathan D. Hibbard, and Louis W. Stern (1994), "The Nature and Consequences of Marketing Channel Commitment," *Marketing Science Institute Working Paper Series*, #94-115, Cambridge, MA.
- Hibbard, Jonathan D., Kent Grayson, and Philip Kotler (1995), "Marketing and Merchandising," *Encyclopedia Britannica*.
- Hibbard, Jonathan D., Nirmalya Kumar, and Louis W. Stern (1995), "Accommodation Processes In Marketing Channel Relationships: Examining the Impact of Destructive Acts," *Proceedings of the International Association for Research in Economic Psychology* (refereed), Summer Conference, Bergen, Norway.
- Buskirk, Bruce and Jonathan D. Hibbard (1987), "Setting the Direct Marketing Research Agenda for Academia," *Journal of Direct Marketing*, 1 (Autumn), 5-11.

#### Cases Authored/Supervised \*

Boston University: *Daewoo Motor Corp: U.S. Entry, Intel Corporation: The Pentium Processor Problem, Cadbury Schweppes: The Acquisition of Dr. Pepper, Airport Travel Journal*

Northwestern University's Kellogg School: *The West Bend Company, Lands' End Direct Merchants*

Harvard Business School: *Anheuser-Busch, British Airways/United Airlines, Vestron, Cigna Worldwide*

\* Several cases reprinted in teaching case compilation books.

#### RECENT PUBLISHED WORKING PAPERS

- 2005 "Using Innovations in Student Teaming to Leverage Cross-Functional and Marketing Learning: Evidence from a Fully Integrated Undergraduate Core" Boston University School of Management Working Paper #2005-50, October 2005 (with Frederic Brunel)
- 2002 "A Real Option-based Framework for Valuing Business Relationships as Strategic Assets," *Boston University School of Management Working Paper Series*, #2002-10, with John E. Hogan.
- 2001 "Diminishing Returns in Relationship Marketing," *Boston University School of Management Working Paper Series*, #2001-14, with Frederic F. Brunel, Rajiv P. Dant, and Dawn Iacobucci.
- 2001 "So That's What It is: Examining the Impact of Analogy on Consumers' Knowledge Development for Really New Products," *Boston University School of Management Working Paper Series*, #2001-05, with Jennifer Grogan-Paxton, Frederic Brunel, and Pablo Azar.

#### RESEARCH-IN-PROGRESS

- Dant, Rajiv P., and Jonathan D. Hibbard, "Examining the Effects of Conflict and Relationalism on Performance in Marketing Channels" Status: Manuscript Development; expect to submit to *Journal of the Academy of Marketing Science*
- Hibbard, Jonathan D., and Steve Kim, "Exploring The Bases of Commitment in Marketing Channel Relationships" Status: Manuscript Development; expect to submit to *International Journal of Research in Marketing*

## SELECTED PRESENTATIONS/CONFERENCES

- "Managing Cross-Functional, Multi-Section Required Courses," 17<sup>th</sup> Annual Production and Operations Management Society Conference, Boston, MA, April 2006 (with Peter Arnold, Frédéric Brunel, J. Robb Dixon, Nitin Joglekar and Paul Morrison)
- "Entrepreneurial Ventures as the Cross-Functional Integration Mechanism in a Core Curriculum", *Changing the Entrepreneurial Landscape*, Joint Conference of the United State Association for Small Business and Entrepreneurship and The Small Business Institute, Tucson AZ, January 2006 (with Nitin Joglekar and Frédéric Brunel).
- "Lessons and Best Practices in Cross-Functional Management Education", Management Education Alliance Conference, held at Bentley College, Waltham, MA, November 2005 (with Nitin Joglekar and Frederic Brunel).
- "Integrated Curriculum: Lessons from 12 years of Cross-Functional Learning", Mid-Atlantic Association of Colleges of Business Administration Annual Conference, Baltimore, MD, October 2005 (with Nitin Joglekar and Frederic Brunel).
- "Cross Functional Integration in a Core Curriculum: Lessons, Best Practices and Evidence of Team-Learning", The International College teaching Methods and Styles Conference, Reno, NV, September 2005 (with Frederic Brunel and Nitin, Joglekar)
- "Team Learning in a Cross-Functional NPD Course," Decision Sciences Institute, Boston, MA, (with Peter Arnold, Frédéric Brunel, and Nitin Joglekar), November 2004.
- "The SMG Undergraduate Cross Functional Core Course" Curricular Innovations In Management Education Conference, Boston, MA., (with Frédéric Brunel and Nitin Joglekar), October 2004.
- "Product Development as the Integrative Theme in Business Core Classes," AACSB International Conference, Montreal, Canada (with Frederic Brunel and Nitin Joglekar), April 2004.
- "Building Exit Barriers as a Proactive Strategy for the Management of Conflict," 7th International Research Conference on Relationship Marketing and Customer Relationship Management, Berlin, Germany (with Karen Koza and Rajiv Dant), June 2003.
- "Exploring *Why* Relationship Marketing May Not Age Well," Babson College Research Forum, Wellesley MA (with Frederic Brunel), November 2002.
- "Does Relationship Marketing Age Well?," *Society for Consumer Psychology*, Austin, TX (with Frederic Brunel, Rajiv Dant and Dawn Iacobucci), February 2002.
- "Valuing Buyer-Seller Relationships as Strategic Firm Assets," presented at the annual Marketing Science Conference (with John E. Hogan), Wiesbaden, Germany, July 2001.
- "A Framework for Valuing Buyer-Seller Relationships as Strategic Firm Assets," invited presentation at London Business School, April 2001, London, England (with John E. Hogan).
- "A Framework for Valuing Buyer-Seller Relationships as Strategic Firm Assets," invited presentation at INSEAD Business School, April 2001, Fountainebleau, France (with John E. Hogan).
- "A Real-Options Based Framework for Valuing Buyer-Seller Relationships as Strategic Firm Assets," presented at The Seventh Joint Conference of the Institute for the Study of Business Markets and The Center for Business and Industrial Marketing, February 2001 (with John E. Hogan), Atlanta, GA.
- "Exploring Diminishing Returns in Long-term Marketing Relationships," AMA Summer Marketing Educators' Conference, Chicago, IL, August 2000 (with Rajiv Dant and Frederic F. Brunel).
- "The Conflict-Performance Assumption in Channels of Distribution," AMA Summer Educators' Conference, San Francisco, CA, August 1999 (with Rajiv Dant).

"Business Marketing Relationships: An Empirical Generalization with Implications for Future Research," 9th World Marketing Congress: Global Perspectives, B-to-B and Relationship Marketing Track, Malta, June 1999 (with Dawn Iacobucci).

"Toward an Encompassing Theory of Relationships in Business and Consumer Marketing: An Empirical Generalization with Implications for Future Research," *Marketing Science Institute Conference* in conjunction with Journal of Marketing, Cambridge, MA June 1998 (with Dawn Iacobucci).

## **RESEARCH GRANTS**

"A Real-Options Based Framework for Valuing Buyer-Seller Relationships as Strategic Firm Assets,"  
Sponsor: Boston University School of Management, Summer 2001

Other research sponsors: Boston University Systems Research Center, Boston University Manufacturing Roundtable, Harvard Business School, The Goodyear Tire & Rubber Company, The Marketing Science Institute

## **TEACHING EXPERIENCE**

1994-present Boston University School of Management Boston, MA  
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1998-present: Taught MK323 Marketing Management  
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1991-1993 Northwestern University Evanston, IL  
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## **INDUSTRY EXPERIENCE**

1985-present *Independent Consultant, Teacher and Researcher in Marketing*  
Worked with firms and organizations on consulting, research, and executive teaching and development projects. Selected clients: Calvin Klein, AT&T, The Wall Street Journal, Texas Instruments, Goodyear Tire & Rubber, Pharmacia & Upjohn, VISA International, CitiCorp, South African Breweries, BlackRock Financial, ServiceMaster, Encyclopedia Britannica, Cigna Worldwide, Franklin Covey.

**Harvard Business School** Boston, MA  
*Associate in Research*

Researched impact of the creation of the European Community's Common Market in 1992 on both European and U.S. firms. Analyzed survey results and authored teaching cases in marketing dealing with entertainment, insurance, airline, and brewing industries.

**Boston University** Boston, MA  
*Assistant Alumni Director*

Coordinated alumni events in 21 metropolitan areas, servicing 25,000 alumni.  
Traveled to promote University's image, supporting development & recruitment.  
Received two prestigious national awards for creativity in alumni programming.

**NCR Corporation** New Haven, CT  
*Sales Representative*

Successfully sold mini-computers to manufacturing and wholesaling firms.  
Developed strong industrial marketing and sales skills.

## **PROFESSIONAL AFFILIATIONS**

American Marketing Association  
Marketing Science Institute

## **SUMMARY OF RECENT SERVICE**

Editorial Board, Journal of Business-to-Business Marketing  
Humphrey Fellow Advisor  
Reviewer, American Marketing Association Winter Educators Conference  
Faculty Board of Advisors, Entrepreneurial Management Institute  
Undergraduate Program Development Committee  
Academic Conduct Committee  
Academic Computing Committee

## **RECENT HONORS, AWARDS**

2006 Ranked one of School of Management's Top Professors in student course-teacher evaluations  
2005 Ranked one of School of Management's Top Professors in student course-teacher evaluations  
2004 General Electric Team Learning Award  
2003 Ranked one of School of Management's Top Professors in student course-teacher evaluations  
2002 Ranked one of School of Management's Top Professors in student course-teacher evaluations  
2001 Ranked one of School of Management's Top Professors in student course-teacher evaluations  
1999 Ranked one of School of Management's "Top 10" MBA professors in student course-teacher evaluations

Revised 1 August 2007

# SCOTT D. SWAIN

August, 2007

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## ACADEMIC APPOINTMENT

Assistant Professor of Marketing, Boston University, School of Management, 2002–present

## EDUCATION

Ph.D. Business Administration, University of South Carolina, 2002

Concentration: Marketing, Minor: Cognitive Psychology

M.B.A. University of South Carolina, 1996

Concentration: Marketing, Minor: International Business

B.S. Electrical Engineering, Clemson University, 1991

B.S. Physics, Francis Marion University, 1991

## REFEREED JOURNAL PUBLICATIONS

Swain, Scott D., Danny Weathers, and Ronald W. Niedrich (in press), “Assessing Three Sources of Misresponse To Negated Likert Items,” *Journal of Marketing Research*.

Niedrich, Ronald W. and Scott D. Swain (in press) "A Dual-Process Model of Memory-Based Pioneering Effects," *Journal of the Academy of Marketing Science*.

Dong, Weimin, Scott D. Swain, and Paul D. Berger (in press), “The Role of Channel Quality in Optimal Allocation of Acquisition and Retention Spending,” *Journal of Business Research*.

Niedrich, Ronald W. and Scott D. Swain (2003) "The Influence of Pioneer Status and Experience Order on Consumer Brand Preference: A Mediated-Effects Model," *Journal of the Academy of Marketing Science*, 31 (Fall), 468-480.

## REFEREED CONFERENCE PROCEEDINGS

Swain, Scott D., Danny Weathers, and Jay P. Carlson (2007), “Partitioning Prices and Whole Number Dominance,” in *Proceedings of the 13<sup>th</sup> International Conference on Industry, Engineering, and Management Systems*, Cocoa Beach, FL: California State University Press, Stanislaus.

Papavasileiou, Eleni Zoi, Scott D. Swain, C.B. Bhattacharya (2007), “Consumers’ Reactions to Acquisitions of Socially Responsible Companies,” *Advances in Consumer Research*,

Vol. 35, eds. Angela Y. Lee and Dilip Soman, Memphis, TN: Association for Consumer Research.

Swain, Scott D. and Weimin Dong (2007), "Maximizing Customer Equity when Acquisition and Retention Rate are Negatively Related," in *Marketing Advances in Pedagogy, Process, and Philosophy*, ed. Tom Baker, San Antonio, TX: Society for Marketing Advances.

Brunel, Frédéric F. and Scott D. Swain (2007) "A Moderated Perceptual Model of Product Aesthetic Evaluations," (with Frédéric F. Brunel) in special session titled "Consumer Response to Aesthetic Aspects of Product Design: 1-, 2-, and 3-Dimensional Perspectives" (Xiaoyan Deng and Wes Hutchinson, co-chairs) in *Advances in Consumer Research*, Vol. 35, eds. Angela Y. Lee and Dilip Soman, Memphis, TN: Association for Consumer Research.

Brunel, Frédéric F. and Scott D. Swain (2007), "A Moderated Perceptual Model of Product Aesthetic Evaluations," in *European Advances in Consumer Research*, Vol. 8, eds. Stefania Borghini, Mary Ann McGrath, and Cele Otnes, Milan, Italy: Association for Consumer Research.

Swain, Scott D. (2007), "Consumer Responses to Product Mass," in *Proceedings of the 13<sup>th</sup> International Conference on Industry, Engineering, and Management Systems*, Cocoa Beach, FL: California State University Press, Stanislaus.

Swain, Scott D., J. Daniel Wadden, and B. Andrew Cudmore (2007), "Compensation and Consumer Guilt," in *Proceedings of the 13<sup>th</sup> International Conference on Industry, Engineering, and Management Systems*, Cocoa Beach, FL: California State University Press, Stanislaus.

Swain, Scott D., Richard C. Hanna, S. Adam Brasel (2006), "Lost in Translation: Consumers' Difficulty in Estimating Expiration Time with Redemption Caps," in *Advances in Consumer Research*, Vol. 34, eds. Gavan Fitzsimons and Vicki Morwitz, Orlando, FL: Association for Consumer Research, 470-472.

Swain, Scott D., Richard C. Hanna, and Lisa J. Abendroth (2006), "How Time Restrictions Work: The Roles Of Urgency, Anticipated Regret, and Deal Evaluations," in *Advances in Consumer Research*, Vol. 33, eds. Cornelia Pechmann and Linda Price, San Antonio, TX: Association for Consumer Research, 523-525.

Brunel, Frédéric F. and Scott D. Swain (2005), "The Role of Product Form in Products' Evoked Sets, Recognition and Evaluation," in *Proceedings of the American Marketing Association's Summer Educators' Conference*, eds. Beth A. Walker and Mark B. Houston, San Francisco, CA: American Marketing Association.

Abendroth, Lisa J., Richard C. Hanna, and Scott D. Swain (2005), "Does the Past Matter? Emotional and Behavioral Responses to Missing Part of a Promotion," in *Proceedings of*

*the Society for Consumer Psychology*, eds. Anne M. Brumbaugh and Geraldine R. Henderson, St. Pete Beach, FL: Society for Consumer Psychology, 30-31.

Hanna, Richard C., Scott D. Swain, and Lisa J. Abendroth (2004) "The Roles of Anticipated Regret and Urgency in Explaining How Discount Level and Time Restriction Affect Purchase Intentions," in *Proceedings of the American Marketing Association's Summer Educators' Conference*, ed. Kenneth L. Bernhardt, James S. Boles, Pam Scholder Ellen, Boston, MA: American Marketing Association, 78-79.

Swain, Scott D., Danny Weathers, and Ronald W. Niedrich (2003), "Effects of Negatively Worded Items on Scale Reliability and Factor Structure," in special session summary titled "Measure for (Valid) Measure: Critical Issues in Developing and Validating Multi-Item, Multi-Dimensional Consumer Psychology Measures" (Frédéric F. Brunel and Cristel A. Russell, co-chairs), in *Proceedings of the Society for Consumer Psychology*, ed. Steven S. Posavac, New Orleans, LA: Society for Consumer Psychology, 143-144.

Becker-Olsen, Karen, B. Andrew Cudmore, and Scott D. Swain (2003), "When Nice Guys Finish First: The Role of Celebrity Endorser Character and Fit on Brand Evaluations," in special session summary titled "Fitting It All Together: A Look at The Fit Construct Across Brand Extension, Sponsorship And Endorsement," (Karen Becker-Olsen, chair) in *European Advances in Consumer Research*, Vol. 6, eds. Stephen Brown and Darach Turley, Dublin, Ireland: Association for Consumer Research, 347-349.

Swain, Scott D. (2003), "Weighing Your Options: The Effect of Product Weight on Preference", in special session summary titled "Weight and Height and Shape and Size: When Do Peripheral Cues Drive Evaluation and Consumption?," (Brian Wansink and Koert van Ittersum, co-chairs), in *Advances in Consumer Research*, Vol. 30, eds. Punam Anand Keller and Dennis W. Rook, Atlanta, GA: Association for Consumer Research, 363-365.

Swain, Scott D., B. Andrew Cudmore, and Karen Becker-Olsen (2003), "The Effect of Celebrities' Personal Lives on the Brands They Endorse," in *Advances in Consumer Research*, Vol. 30, eds. Punam Anand Keller and Dennis W. Rook, Atlanta, GA, Association for Consumer Research, 346-347.

Cudmore, B. Andrew, Scott D. Swain, and Karen Becker-Olsen (2002), "The Effect of Endorser Behavior on Brand Attitudes: The Moderating Role of Knowledge," in *Marketing Advances in Pedagogy, Process, and Philosophy*, ed. Beverly T. Venable, St. Pete Beach, FL: Society for Marketing Advances, 83-84.

Wood, Stacy L., Scott D. Swain, and J. Daniel Wadden (2001), "Consumer Perceptions of Product Parity in E-Commerce Markets," in *Advances in Consumer Research*, Vol. 28, J. Meyers-Levy, ed. Salt Lake City, UT: Association for Consumer Research, 394.

Swain, Scott D. and B. Andrew Cudmore (2001), "When Bad is Good: The Resilience of Consumer Brand Evaluations to Negative Information about Their Celebrity Endorsers,"



in *Proceedings of the Academy of Business Disciplines*, Eldon Little and Dave Strupeck, eds. Ft. Meyers, FL: Academy of Business Disciplines, on CD-ROM.

#### PROFESSIONAL PUBLICATIONS

Swain, Scott D. (2007), "Playing the Cards," *Builders and Leaders*, Spring, 22-24.

Berger, Paul D., Richard C. Hanna, Scott D. Swain, and Bruce D. Weinberg (2007), "The Great Potential Benefits of Vertical Cooperative Advertising," *Advertising Express*, 2 (February), 7-11. (Cover article)

Berger, Paul D., Richard C. Hanna, and Scott D. Swain (2006), "Collaborative Filtering: The Potential to Increase Advertising Efficiency," *Advertising Express*, 6 (May), 11-14.

Swain, Scott D., Richard C. Hanna, and Lisa J. Abendroth (2004), "Buying Time: The Consumer Psychology of Time Limits," *Builders and Leaders*, Fall, 26-27.

#### BOOK CHAPTER

Berger, Paul D., Richard C. Hanna, and Scott D. Swain (2006), "Collaborative Filtering: The Potential to Increase Advertising Efficiency," in *Emerging Strategic Issues of Media and Advertising Management*, Sabyasachi Chatterjeem, ed. Hyderabad: ICFAI University Press.

#### PUBLISHED TECHNICAL REPORTS

"A Dual-Process Model of Memory-Based Pioneering Effects" (with Ronald W. Niedrich) *Boston University School of Management Working Paper #2007-21*.

"Incorporating Managerial Judgment in an Extended Model of Customer Equity" (with Weimin Dong), *Boston University School of Management Working Paper #2007-13*.

"Misresponse to Reversed Likert Items: Acquiescence, Inattention, or Item Difficulty?" (with Danny Weathers and Ronald W. Niedrich), *Boston University School of Management Working Paper #2006-12*.

"The Role of Channel Quality in Optimal Allocation of Acquisition and Retention Spending" (with Paul D. Berger and Weimin Dong), *Boston University School of Management Working Paper #2006-11*.

"A Two-Route Model of Product Aesthetic Evaluation" (with Frédéric F. Brunel), *Boston University School of Management Working Paper #2006-09*.

#### RESEARCH UNDER REVISION OR REVIEW

- "The Effect of Monetary Format on the Assignment of Windfall Income to Mental Accounts," (with Tim Silk and Laura Smarandescu), Society for Consumer Psychology, New Orleans, LA
- "An Examination of Concreteness and Whole Number Dominance Effects on the Evaluation of Percentage Shipping Charges," (with Danny Weathers and Jay P. Carlson), Society for Consumer Psychology, New Orleans, LA
- "Impact of Price Format in Two-Part Pricing Evaluations," (with Danny Weathers, and Jay P. Carlson) in special session summary titled "Retail Pricing Perceptions," (Gerry Smith and Kathleen Seiders, co-chairs), American Marketing Association, Austin, TX
- "Aesthetics and Consumption," (with Frédéric F. Brunel), invited chapter for *Handbook of Consumer Research*

#### RESEARCH IN PROGRESS

- "The Role of Urgency in Promotional Response" (with Richard C. Hanna and Lisa J. Abendroth); Manuscript in final stage of preparation, to be submitted to the *Journal of Retailing*
- "Overcompensation in Service Recovery: Positive and Negative Consequences of Consumer Guilt" (with J. Daniel Wadden and Andrew Cudmore); Manuscript in final stage of preparation, to be submitted to the *Journal of Retailing*
- "Simple Solutions to Some Vexing Problems in Survey Research Analysis" (with Sajeev Varki); Data collected, simulations complete, manuscript drafted. To be submitted to *Journal of Marketing Research*
- "Promotional Response as Swarm Intelligence: A Consumer-Oriented Application of RFID Technology," Study and simulation completed, manuscript drafted. To be submitted to *International Journal of Research in Marketing*
- "Attaching Confidence to Factor Structures Obtained from Multi-item Scales," (with Danny Weathers); Simulations completed, manuscript drafted. To be submitted to the *Journal of Marketing Research*.
- "Visualization of High Dimensional Data: Probabilistic Archetype Analysis" (with Sajeev Varki); Programming and data collection complete. Manuscript in draft. To be submitted to *Marketing Science*.
- "Weighing Your Options: Consumer Responses to Product Mass"; Data collected, manuscript drafted. To be submitted to *Journal of Consumer Research*.
- "The Effect of Search Set Size on Consumer Perceptions of Product Parity and Choice Satisfaction" (with Stacy L. Wood and J. Daniel Wadden); Three studies completed, manuscript drafted. To be submitted to *Journal of Consumer Research*.

"Design and the Big Five: Linking Visual Product Aesthetics to Product Personality," (with Frédéric F. Brunel and Rishtee Kumar); In collaboration with General Motors design research group; Four studies completed, analysis in progress. To be submitted to *Journal of Marketing*.

#### PRESENTATIONS OF RESEARCH

"Consumers' Reactions to Acquisitions of Socially Responsible Companies," *Association for Consumer Research*, Memphis, TN, 2007

"Maximizing Customer Equity when Acquisition and Retention Rate are Negatively Related," *Society for Marketing Advances*, San Antonio, TX, 2007

"A Moderated Perceptual Model of Product Aesthetic Evaluations," *Association for Consumer Research*, Memphis, TN, 2007

"Mere Format: The Mental Accounting of Gift Cards," invited presentation, University of Massachusetts, Amherst, MA, scheduled

"Modeling Consumer Aesthetic Response to Product Design," *Ivey Research Series*, University of Western Ontario, 2007

"Partitioned Prices and Whole Number Dominance," *13<sup>th</sup> International Conference on Industry, Engineering, and Management Systems*, Cocoa Beach, FL, 2007

"A Moderated Perceptual Model of Product Aesthetic Evaluations," *Association for Consumer Research*, Milan, Italy, 2007

"Consumer Responses to Product Mass," *13<sup>th</sup> International Conference on Industry, Engineering, and Management Systems*, Cocoa Beach, FL, 2007

"Windfall Formats and Consumer Spending Behavior: The Permeation Hypothesis," invited presentation, Boston University, *School of Management Seminar Series*, Boston, MA, 2007

"Compensation and Consumer Guilt," *13<sup>th</sup> International Conference on Industry, Engineering, and Management Systems*, Cocoa Beach, FL, 2007

"A Two-Step Differential Model of Visual Product Aesthetics," Invited Lecture, Boston University, *School of Management Seminar Series*, Boston, MA, 2006

"Lost in Translation: Consumers' Difficulty in Estimating Expiration Time with Redemption Caps," *Association for Consumer Research*, Orlando, FL, 2006

"Design and the Big Five: Linking Visual Product Aesthetics to Product Personality," *Association for Consumer Research*, Orlando, FL, 2006

- “Product Designs and the Centrality of Visual Product Aesthetics,” *Research Colloquium*, Merage School of Business, University of California-Irvine, 2006
- “How do Consumers Evaluate Product Designs?,” invited presentation, *Lecture Series of The Faculty of Industrial Design Engineering*, Delft University, Delft, The Netherlands, 2005
- “The Decoupling of Rational and Sub-rational Preferences in Product Evaluations,” presentation, *Boston University Faculty Research Symposium*, Boston, MA, 2005
- “How Time Restrictions Work: The Roles of Urgency, Anticipated Regret, and Deal Evaluations,” *Association for Consumer Research*, San Antonio, TX, 2005
- “The Role of Product Form in Products’ Evoked Sets, Recognition and Evaluation,” *American Marketing Association, Winter Educators’ Conference*, Boston, MA, 2005
- “The Role of Product Form in Evoked Sets, Recognition, and Evaluation,” invited presentation, *3<sup>rd</sup> Annual Babson College Research Colloquium*, sponsored by *Journal of Retailing*, 2005
- “Longevity Signals: Stirring the Antinomy of Progress versus Primitivism,” invited presentation, Boston University, *School of Management Seminar Series*, Boston, MA, 2005
- “Does the Past Matter? Emotional and Behavioral Responses to Missing Part of a Promotion,” *Society for Consumer Psychology*, St. Pete Beach, FL, 2005
- “Consequences of Negation in Measurement,” invited presentation, Boston University, *School of Management Seminar Series*, Boston, MA, 2004
- “The Roles of Anticipated Regret and Urgency in Explaining How Discount Level and Time Restriction Affect Purchase Intentions,” *American Marketing Association, Summer Educators’ Conference*, Boston, MA, 2004
- “When Nice Guys Finish First: The Role of Celebrity Endorser Character and Fit on Brand Evaluations,” *Association for Consumer Research*, Dublin, Ireland, 2003
- “Effects of Negatively Worded Items on Scale Reliability and Factor Structure,” *Society for Consumer Psychology*, New Orleans, LA, 2003
- “The Effect of Choice Set Composition on Pre-Choice Satisfaction,” invited presentation, Boston University, *School of Management Seminar Series*, Boston, MA, 2003
- “The Effect of Celebrities’ Personal Lives on the Brands They Endorse,” *Association for Consumer Research*, Atlanta, GA, 2002
- “Weighing Your Options: The Effect of Product Weight on Preference,” *Association for Consumer Research*, Atlanta, GA, 2002

“The Effect of Endorser Behavior on Brand Attitudes: The Moderating Role of Knowledge,”  
*Society for Marketing Advances*, St. Pete Beach, FL, 2002

“Consumer Response to Product Physicality,” invited presentation, Boston University,  
Cincinnati University, University of Delaware, University of South Carolina, and Villanova  
University, 2002

“Consumer Perceptions of Product Parity in E-Commerce Markets,” *Association for Consumer  
Research*, Salt Lake City, UT, 2001

“When Bad is Good: The Resilience of Consumer Brand Evaluations to Negative Information  
about Their Celebrity Endorsers,” *Academy of Business Disciplines*, Ft. Meyers, FL, 2001

#### TEACHING EXPERIENCE AND SERVICE

Faculty, Boston University, School of Management, 2002–present

Instructor, University of South Carolina, Moore School of Business, 1999–2002

Tutor, University of South Carolina, Athletic Department, 1998–2001

##### Courses Taught (Average instructor rating across 24 sections: 4.6/5.0)

Doctoral: The Consumer Focused Company, scheduled

MBA: Marketing Research, 2004, 2005, 2006

Undergrad: Marketing Research, 2002, 2003, 2004, 2005, 2006, 2007

Undergrad: Marketing Communications and Strategy, 2002

Undergrad: Marketing Strategy and Planning, 2001

Undergrad: Consumer Behavior, 2000

Undergrad: Product Management, 1999, 2000

##### Dissertations, Theses, and Directed Studies

Chair, dissertation (Mr. Weimin Dong)

Committee, dissertation (Mr. Daniel Korschun)

Chair, Bachelor of Science (Ms. Laura Antunes)

Chair, Masters of Science (Mr. Mark Michaud)

##### Instructional Material Development

- Internet Exercises in Shimp (2001), Advertising, Promotion, and Supplemental Aspects of  
*Integrated Marketing Communications*, 5th ed., The Dryden Press: Fort Worth, TX
- Boston University Guidebook: Review of Descriptive Statistics & Probability
- Boston University Guidebook: Review of Inferential Statistics & Hypothesis Testing
- Boston University Guidebook: Using SPSS for Marketing Research
- Cases, simulations, and software for marketing research

#### SERVICE TO THE DISCIPLINE

##### Reviewing for Journals and Conferences

- *Journal of Business Research* 2006, 2007

- *Journal of Consumer Research* 2004, 2005
- *Association for Consumer Research* 2001, 2002, 2003, 2005, 2006,
- *Association for Consumer Research-Europe* 2004, 2005, 2007
- *American Marketing Association-Summer* 2003, 2004, 2007
- *American Marketing Association-Winter* 2002, 2005, 2006, 2007, 2008
- *Academy of Marketing Science* 2003
- *MIT World Conference on Mass Customization & Personalization* 2007
- *Society for Consumer Psychology* 2006, 2007, 2008
- *Society for Marketing Advances* 2003, 2007
- *World Marketing Congress* 2004

#### Other Service to Discipline

- Board of Directors, AMA Doctoral Special Interest Group (DocSIG), 2006–2007
- Owner, MRKT-PHD listserv, 1320 subscribers, 230 institutions, 60 countries, 1997–2007
- Secretary, American Marketing Association Doctoral Special Interest Group, 2000–2002
- AMA Summer Educator's Conference, DocSIG faculty panel, 2004

#### Books Reviewed

Burns, Alvin C. and Ronald F. Bush (2006), *Marketing Research*, 5<sup>th</sup> edition, Prentice Hall  
 Malholtra, Naresh K. (2006), *Marketing Research: An Applied Orientation*, 5<sup>th</sup> edition,  
 Pearson, Upper Saddle River, NJ  
 McDaniel, Carl Jr. and Roger Gates (2005, 2007), *Marketing Research*, 6<sup>th</sup> and 8<sup>th</sup> editions,  
 Wiley, Hoboken, NJ  
 Molinari, James (2005), *Marketing Research Project Manual*, McGraw-Hill, Boston, MA  
 Parasuraman, A., Dhruv Grewal, and Krishnan, R. (2006), *Marketing Research*, 2<sup>nd</sup> edition,  
 Houghton Mifflin, Boston, MA

#### **UNIVERSITY SERVICE**

- Examiner, doctoral comprehensives 2002, 2003, 2004, 2005, 2006, 2007
- Faculty search committee, 2002, 2003, 2005, 2006, 2007
- Chair, marketing department speaker series, 2004, 2005, 2006, 2007
- Subject Pool Coordinator, School of Management 2004, 2005, 2006, 2007
- Member, doctoral curriculum committee, 2002, 2003, 2004, 2005, 2006, 2007
- MBA marketing concentration advisor, 2004, 2005, 2006, 2007
- Faculty Host, School of Management Spring Open House, 2003, 2004, 2005, 2006, 2007
- Doctoral dissertation chair, Mr. Weimin Dong, 2007
- Doctoral dissertation committee member, Mr. Daniel Korschun, 2007
- Chair, directed study for Ms. Laura Antunes (Bachelor of Science), 2007
- Liaison, undergraduate marketing program, 2003, 2004, 2005, 2006, 2007
- Member, Research Computing and Databases Support Committee, 2006, 2007
- Speaker, undergraduate concentration orientation, 2006, 2007
- Participant, Sakai course software development, 2006, 2007
- Chair, directed study for Mr. Mark Michaud (Master of Science, MBA), 2005
- Speaker, MBA concentration orientation, 2004, 2005
- Speaker, faculty research retreat ("Ethics in Marketing Research"), 2002

## ACADEMIC HONORS AND AWARDS

2007 Boston University Alumni Legacy Gift Teaching Award  
2007 \$14,500 grant from Faculty Research Development Fund at Boston University  
2007 Included in Marquis *Who's Who in America*  
2006 \$11,615 grant from Faculty Research Development Fund at Boston University  
2006 Included in Academic Keys *Who's Who in Business Education*  
2005 \$22,222 grant from Faculty Research Development Fund at Boston University  
2005 Boston University Alumni Legacy Gift Teaching Award  
2004 \$10,000 grant from Faculty Research Development Fund at Boston University  
2003 \$5,000 grant from the Faculty Research Development Fund at Boston University  
2003 Beta Gamma Sigma (Business honor society)  
2002 Excellence in teaching award, Honors College, University of South Carolina  
2001 Fellow, Association for Consumer Research Doctoral Symposium  
2000 Fellow, Marketing and Public Policy Doctoral Symposium  
1999 Fellow, American Marketing Association Sheth-Foundation Doctoral Consortium  
1998 Chi Delta Chi (US Veterans honor society)  
1996 MBA Award, top student at University of South Carolina  
1994 Francis M. Hipp Merit Fellowship (full MBA tuition and stipend)  
1991 Outstanding Senior in Electrical Engineering at Clemson University  
1990 Eta Kappa Nu (Electrical Engineering honor society, top 10% of students)  
1989 Phi Kappa Phi (Interdisciplinary honor society, top 5% of students)  
1988 Student Marshall (top 5% of juniors; represent university at functions)  
1986 Patriot Scholar (athletic scholarship: soccer)  
1986 William Douglas Dargan Merit Scholarship (full undergraduate tuition and stipend)

## PROFESSIONAL AFFILIATIONS

- Association for Consumer Research
- American Marketing Association
- Academy of Marketing Science
- American Psychological Association
- Institute of Electrical and Electronic Engineers
- Marketing Science Institute
- Society for Consumer Psychology
- Society for Marketing Advances

## MEDIA APPEARANCES

February 16, 2007, *WTBU Friday Night Sports Block* (television). Interviewed about the ticket pricing strategy of the Boston Red Sox.  
September 10, 2004, *Daily Free Press* (newspaper). Interviewed about consumer psychology of dieting ("Don't Fear Potatoes: The Skinny on Low-Carb Diets").  
March 24, 2004, *CN8 Nitebeat with Barry Nolan* (television). Interviewed about marketing strategies associated with low-carbohydrate health trend.

#### **OTHER SIGNIFICANT WORK EXPERIENCE**

- 1990–1994 Nuclear Submarine Engineering Officer, United States Navy
- 1988–1989 Manager, Downwind Trading Company, Myrtle Beach, SC
- 1986–1988 Ocean Rescue, City of Myrtle Beach, Myrtle Beach, SC